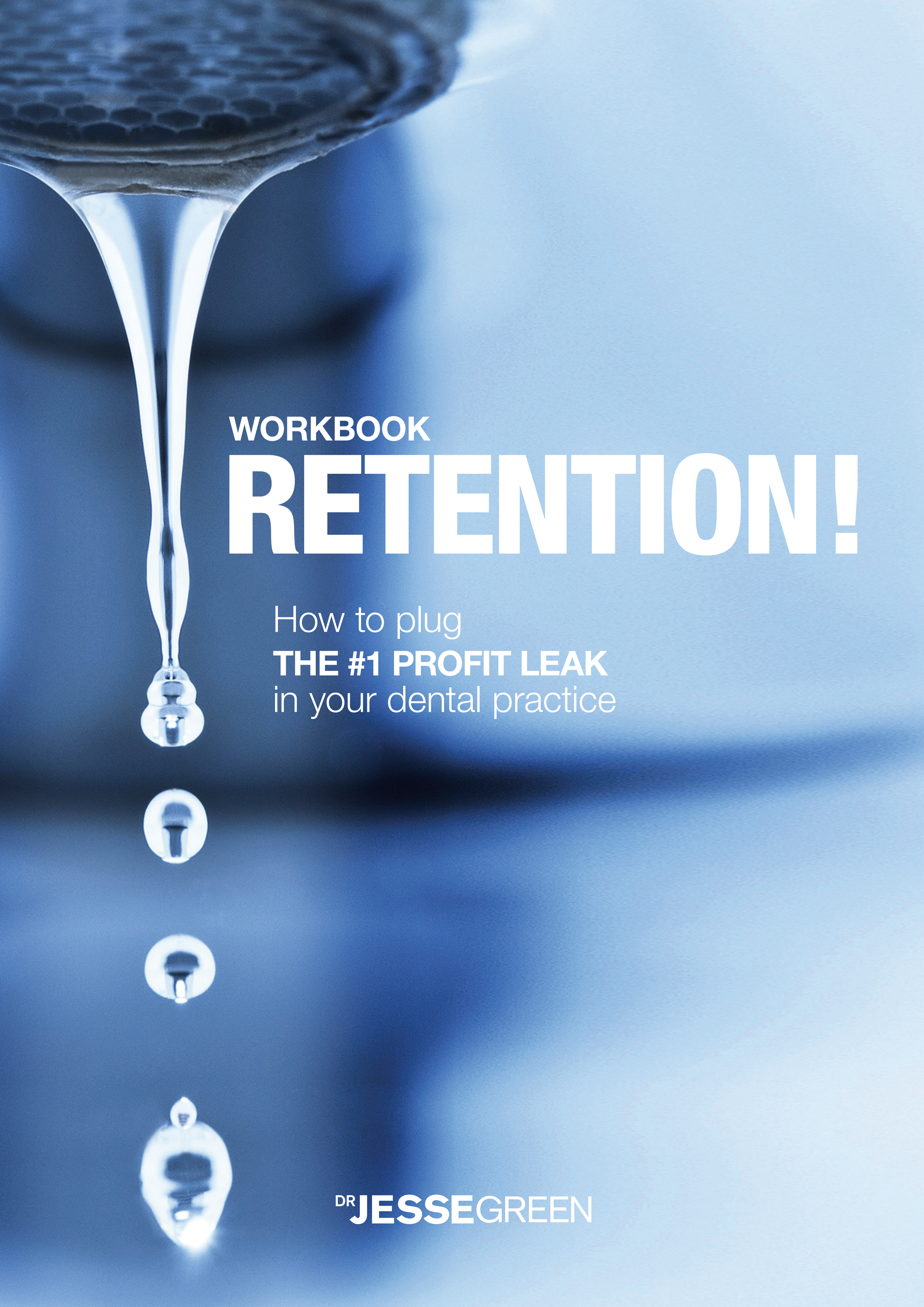

WORKBOOK

RETENTION!

How to plug
THE #1 PROFIT LEAK
in your dental practice

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CONTENTS

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INTRODUCTION

Welcome to the companion workbook to
Retention! How to plug the #1 Profit Leak in your Dental Practice

In this workbook my intention is to give you more in-depth information on how to implement the recommendations that I make in the book, as well as more detail on practicalities via tailored checklists, step-by-step To Do's and planning tools. Using these tools, you can tailor my advice to fit your practice, whatever your philosophy and style.

I would recommend that you use this workbook in conjunction with the long-form book, to give you the most in-depth understanding of how a practice that works in this manner functions. From the book itself, you'll garner explanations, examples and anecdotes that expand your understanding of how a successful practice runs. I go in-depth into the concepts behind the practicalities, explaining *why* certain ways of running a practice are more successful than others, and the psychology that underpins a successful practice. The workbook, on the other hand, will give you the tools, checklists and resources that you can use in a practical way to step through the recommendations yourself, without you having to reinvent the wheel.

The resources in this workbook are ones that I use myself in my practice, and with my clients. They have proven their worth over and over – when they are implemented. And this is the key. If you are to see results from this information, you need to become a do-er. Read it, absorb it, then make a plan of action from it. Step your way through the workbook, reading the book alongside, and watch as your patients stay with you – and then begin to refer their family and friends.

PATIENT RETENTION, THE NEW BLACK

External marketing of your practice is not – and should not – be the only tool that you rely on to bring patients through the door. In changing economic times, it makes sense to look at your practice and find areas to improve that won't cost you a marketing cent, let alone thousands of dollars.

Given the shake-up of the dental profession through various means, including the oversupply of dentists, corporatisation, the increasing influence of health-funds and dental tourism etc, you need to find a reliable way to keep the patients you have, and create relationships with them that last, regardless of the economic climate.

There are specific actions that most successful dental practices take that raise them above the mundane, to being practices that patients rave about, and refer their families and friends to. It is your patients who will support you through the difficult times. Your job is to give them a reason to want to do so.

FINDING YOUR “WHY”

Companies that are founded on a larger “why” are always more memorable and more successful because of it. This is because they don’t just provide a service based on a need, as is the case in many dental practices. A business that is not operating from a larger, overarching “why” may provide a satisfactory experience, but it won’t have the extra “wow” factor that a business operating from a vision will. When businesses have found their “why”, it underpins everything they do, and customers can feel that – and respond accordingly.

When I talk to dentists about their “why”, some feel it is a waste of time, and would rather get to some practical steps. The importance of taking the time to dig into vision and purpose should not be underestimated. Purpose-driven businesses are not only more profitable but also more fulfilling for those in them. This has implications for the bottom line both from a patient acquisition and retention perspective, but also from a staff retention perspective too. Finding and communicating your “why” will galvanise your staff and your patients, which is good for business.

A set of preliminary questions accompany the discussion of finding your “why” in the book, and I’ll touch on a mere few of these here. An in-depth discussion of vision and values is beyond the scope of this workbook, but I’d encourage you to note the importance of them, and educate yourself about what these terms mean, and how they underpin the actions that companies take.

My suggestion is that you devote quite a chunk of time to finding your vision and values and applying them to your practice – and this will then inform the rest of the decisions you make and actions you take.

How to Find Your "Why"

- Journal about what you used to enjoy doing when you were growing up. Who were your favourite teachers at school, and why were they so inspiring? What activities make you lose track of time, and what are you naturally good at?

  This activity is designed to put you in touch with the core things that you enjoy, which can give you a good idea of where your "why" lies.

  See if you can pick out an overarching theme to your journaling. This is the key to your "why" – your purpose.

- Look at your practice: is it giving life to your "why"? How can you better bring your "why" into your practice?

  Values are most effective when they are given meaning and communicated as action statements. For example:

  1. The value of honesty could be expressed as:
     We tell the truth, no matter how inconvenient.

  2. The value of community could be expressed as:
     We actively create meaningful connections with patients.

  Doing this will allow you to feel a greater sense of congruence between your practice and yourself. This will then naturally flow into everything you do.

Key Points

- People don't buy what you do, they buy "why" you do it.
- Your "why" drives everything you do. Finding and communicating a powerful "why" is a catalyst for strong, patient-led, profitable practice.
- Purpose-driven practices are more profitable, more fulfilling for the people in them, and attract loyal patients who pay, stay and refer.

Further Resources to Explore

Start with Why Simon Sinek
Delivering Happiness Tony Hseih
Inspired Destiny – Living a Fulfilling and Purposeful Life
Dr. John F. DeMartini

STAY WITH ME

Being merely a competent dentist is not enough to secure you adequate patient flow. This is a testament to the difficult and changing environment facing dentists today.

It is imperative to the health of your practice that you learn how to create an atmosphere that encourages patients to stay with you – and to refer their family and friends. There are specific ways to do this, and I'm happy to show you how here.

To begin creating a practice which functions to attract and retain patients, first focus on building value for your service.

Building Value

To achieve a practice where patients attend their appointments, don't cancel and accept treatment, building value is of the utmost importance.

Using every opportunity to describe to the patient what service they are being provided with, and how that will help them, builds patient confidence in what you do – and also articulates for them exactly why the service is valuable.

Of course, for this to be effective, you need to recognise the value that you are providing them. The next page contains an example of how I build value in my practice. You'll notice that value is built at each interaction, or at as many interactions – also called touch-points – in the practice as possible.

The following are examples of how we build value in my own practice. Note that value is built at every interaction that we have with a patient:

The patient is in the dental chair and treatment is yet to commence

Build value for what treatment is to be done that day.

I would say to Mrs Jones:

"Mrs Jones, today we're going to be completing a restoration on the upper right hand side. It's important we're getting onto this today because left untreated, this tooth could easily become problematic."

The patient is in the chair and treatment is underway

Build value for the treatment currently being performed.

"Mrs Jones, I'm really glad we're doing this restoration today. The cavity is quite large and if we'd left it any longer, it would almost certainly have caused you problems."

The treatment has been completed and the patient is still in the surgery

Build value for treatment just completed.

"Mrs Jones, I'm really pleased we completed the restoration today. Once I opened up the cavity it was quite deep and if it had been left too much longer, it would almost certainly have caused you problems."

At reception, handing the patient over to the receptionist

I would turn to my receptionist and say:

"Mary, Mrs Jones has done really well today. We have done a really large restoration for her on the upper right first molar. It was good that we were able to complete that today because otherwise it could well have caused a few dreams if we'd left it. Mrs Jones has another cavity on the lower left second molar and I'm worried that it is left too long it could also lead to problems. I'm anxious to complete that as soon as possible."

I would then address Mrs Jones again:

"Mrs Jones: so that you don't have any nasty problems, it is important that we address the decay in the lower left second molar. Mary will make a time for you to come in and get that fixed up that first in wit your diary. Do you have any questions for me before I leave you with Mary?"

I then leave Mrs Jones with Mary, to make her next appointment, which is also a structured conversation designed to gain a commitment from the patient to attend the next appointment.

Receptionist makes the appointment and gains commitment

Mary: "Mrs Jones do you have any day of the week that don't work for you in terms of scheduling an appointment?"

Mrs Jones: "Tuesday and Friday's are not so good for me. I travel with work those days."

Mary: "And do you prefer a morning or afternoon appointment?"

Mrs Jones: "Morning please."

Mary: "Mrs Jones I have Monday at 9am or Wednesday at 10:30 am. Which of those suits you best?"

Mrs Jones: "Wednesday at 10:30 am please."

Mary: "OK Mrs Jones, I have you booked in to see Dr Green to attend to the lower left molar at 10.30am this Wednesday. So, you'll be alright to keep that appointment."

Mrs Jones: "Yes, I'll be fine to keep that appointment."

Mary: "Great. Well, we look forward to seeing you at 10.30am on Wednesday."

Key Points

- Building value for your service is the foundation for patient retention.
- Practise building value before, during and after the appointment, and in as many ways as you can.

CUSTOMER EXPERIENCE

An outstanding customer experience doesn't happen by accident. It is a carefully crafted piece of choreography that comes from firstly understanding the patient journey through your practice, and secondly what has to happen at each step of that journey.

Touch-points

Creating an excellent customer experience begins by understanding the interactions a patient may have with your business or your brand. These interactions are called touch-points.

It is important to map the touch-points that your patient has with your practice. By mapping the touch-points you'll be mapping the patient's journey through the practice. Understanding the patient journey will allow you to identify which elements of the patient journey are critical and require extra attention, and where you have the opportunity to create a memorable experience for your patient.

By slicing the customer journey into as fine slices as possible (ie: as many touch-points as possible) you are able to create a series of processes that when stacked one on top of the other, lead to multiple moments of connection and a truly remarkable experience.

Read the example through, and then map the touch-points in your practice.

Mapping Touch-points

In this exercise we will consider these interactions based on the four different stages of the patients' journey through the practice.

Example:

Touch-points of a Bank

Banking customers experience multiple touch-points with a bank, such as tellers, customer service advisors, promotional events, IT systems, financial statements, loan applications, call centres, financial advisors, products and so on.

Before the Appointment

Identify the possible interactions a patient could have with your practice or your brand before an appointment.

During the Appointment

Identify the possible interactions a patient could have with your practice or your brand during an appointment.

After the Appointment

Identify the possible interactions a patient could have with your practice or your brand after an appointment.

In Between the Appointment

Identify the possible interactions a patient could have with your practice or your brand in between an appointment.

Key Points

- Mapping the touch-points that patients have with your practice will help you figure out what you can do at each point to build value.
- Choreograph the entire experience that patients have with your practice. The aim here is for a consistent experience, every time they call or visit.

SERVICE STANDARDS

The cornerstone of creating a great customer experience is to apply the concept of Service Standards at each of the touch-points you've already identified. Used in conjunction with Building Value, these create a WOW experience for your patients – one that they will rave about to their friends and family.

Creating Service Standards helps you and your staff to craft a patient experience that is unique to your practice, but that is replicable with every patient who walks through the door. The brilliant thing about them is that they also allow staff to be themselves while they're at work.

A well-crafted Service Standard becomes a benchmark and guiding light for the operations of the practice.

Below are the Service Standards that I apply in my practice. Feel free to use them in yours, or use the format to create your own, with your own personality and values guiding their creation. The key is to remember to use them once you've created them, and to build their use into every aspect of practice operation.

Service Standards

1. The Name Game

The most musical sound is the sound of one's own name. Be sure to address your patients by name wherever possible.

2. Be Present

Being present means being truly engaged with your patient rather than having your mind wander elsewhere. Being present is the foundation of empathy and vital to developing relationships.

3. 'Yes'

Wherever possible try to say Yes to the patient. Start sentences with:
"The simplest way to do that..."
"The fastest way to get that done is..."
"The best way to handle that is..."

4. Plus One

This involves discovering our patients' service expectations and then doing at least one thing to exceed them. With Plus One, you create an opportunity for multiple moments of connection in the overall patient experience.

5. Have Fun!

Having fun and being playful creates an environment where patients feel more relaxed at a time when they might otherwise feel more anxious.

PUTTING IT ALL TOGETHER

Creating a remarkable customer experience does not happen by accident. It occurs by carefully designing and systemising the experience you want for your patients. Uniqueness and value are perceptions, and it is almost always what is wrapped around the product or service that creates the perception rather than the product or service itself. Little things make a profound difference.

Now that you've mapped your patients' touch-points and decided on your Service Standards, the final key to making sure that your patients have an experience that "wows" them is to choreograph their experience at your practice. Choreographing the patient experience means creating a series of processes that lead to a systematic approach to the customer experience. Once these processes are ingrained, people can overlay their personality onto them – they can bring the Service Standards to life.

The way to design that experience is to determine how to apply the service standards you have articulated to the patient touch-points in your practice by asking, "how would an inspiring business behave at this moment?"

Use the following flowchart to fully map out your processes and ensure that there are no steps missing in the choreography of the patient experience in your practice.

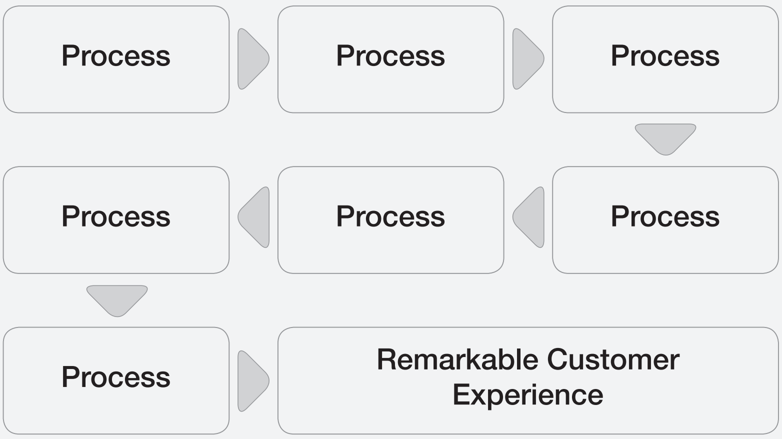
Creating a Remarkable Customer Experience

Creating a remarkable customer experience does not happen by accident. It occurs by carefully designing and systemising the experience you want for your patients.

The way to design that experience is to determine how to apply the service standards you have articulated to all the patient touch-points in your practice by asking "how would an inspiring business behave at this moment?"

Uniqueness and value are perceptions and it is almost always what is wrapped around a product or service that creates the perception rather than the product or service itself. Little things make a profound difference.

By slicing the customer journey into fine slices you are able to create a series of processes that when stacked one on top of the other, lead to a multiple moments of connection and a truly remarkable experience.



Key Points

- A great patient experience is created with specific intent. It doesn't just happen.
- Service Standards combined with touch-points are used to systemise the process for your team. They help your team replicate a great customer experience every time a patient interacts with your practice.
- Determining how to apply the Service Standards to all of the touch-points in your practice means that your personality and mission permeates everything you do. This means your practice becomes more reflective of who you are, and why you do what you do.
- WOW customer service is achieved by creating multiple moments of connection in the patient experience. These moments deepen relationships and cement loyalty.
- Always ask yourself the question: "How would an inspirational practice do this?"

WOULD YOU STAND ME UP?

Cancellations and no-shows open up unplanned holes in your appointment book, and represent lost income and opportunity.

Years ago a mentor taught me that the purpose of an appointment is to book another appointment.

Clearly, creating a practice that has minimal time lost to these causes is imperative for both patient flow and cash flow. However, what is often overlooked is the importance of minimising cancellations and no-shows to aid patient retention. The loss of a patient is usually preceded by a cancellation or no show.

The three reasons why patients feel it is ok to cancel an appointment are:

- They don't feel that the appointment is valuable enough – it does not remain their top priority,
- There have been no consequences for missed appointments in the past, and
- They have not been asked to commit to the appointed time.

These three things, when used together, will almost eliminate no-shows and cancellations in your practice.

Building value for your service – before, during and after the appointment – will take care of the first point; that the patient doesn't feel that the appointment is valuable enough for them to give it importance. See the earlier section on building value for exercises to work on this.

Consequences for missed appointments can be tricky to navigate, given that if there have been no consequences for prior missed appointments, there is an expectation that there will not be any now. Consequences can range from making a patient wait a few weeks for a new appointment, to asking them to pre-pay a non-refundable deposit for their appointment. You can tailor your consequences to suit your own practice, and your style of operation.

Exercise

Determine what consequences patients may face if they cancel their appointment. Remember that any consequence needs to be proportionate to the 'infringement' and that consistency is critical. When discussing consequences with patients, avoid quoting practice policy. Quoting a policy can sound impersonal and convey an attitude of indifference.

Asking a patient to commit to their appointment time invokes the principle of commitment and consistency. (Discussed in detail in the book *Influence – The Psychology of Persuasion* by Robert Cialdini) Making a public declaration of something commits you to acting on it – even with something like a dental appointment. For this reason, I have my staff follow particular scripts when making and confirming appointments with patients. I call the script for making appointments, the cascading series of alternate choices.

Exercise

See the script below, and then spend some time working out a script for your staff on making and confirming appointments with your patients. It's worth the time investment to ensure that your appointment book is as leak-proof as possible.

Script

For booking appointments:

Are there days of the week that don't work for you?
Do you prefer morning or afternoon appointments? (Always give them a choice) *I can offer you _____day at x o'clock or _____ day at y o'clock. Which one of those would suit you best?* (Both options work well for the schedule of the practice).

Then: orient and commit:

Ok _______________, we'll look forward to seeing you on _________________________ for your examination. You'll be seeing Dr ________________ and your Hygienist ___________________.

They will take the necessary films and check your dental health thoroughly. They'll also discuss with you where to go from there. Does that make sense? We are looking forward to seeing you on (Day), (Date), at (Time). Will you be there?

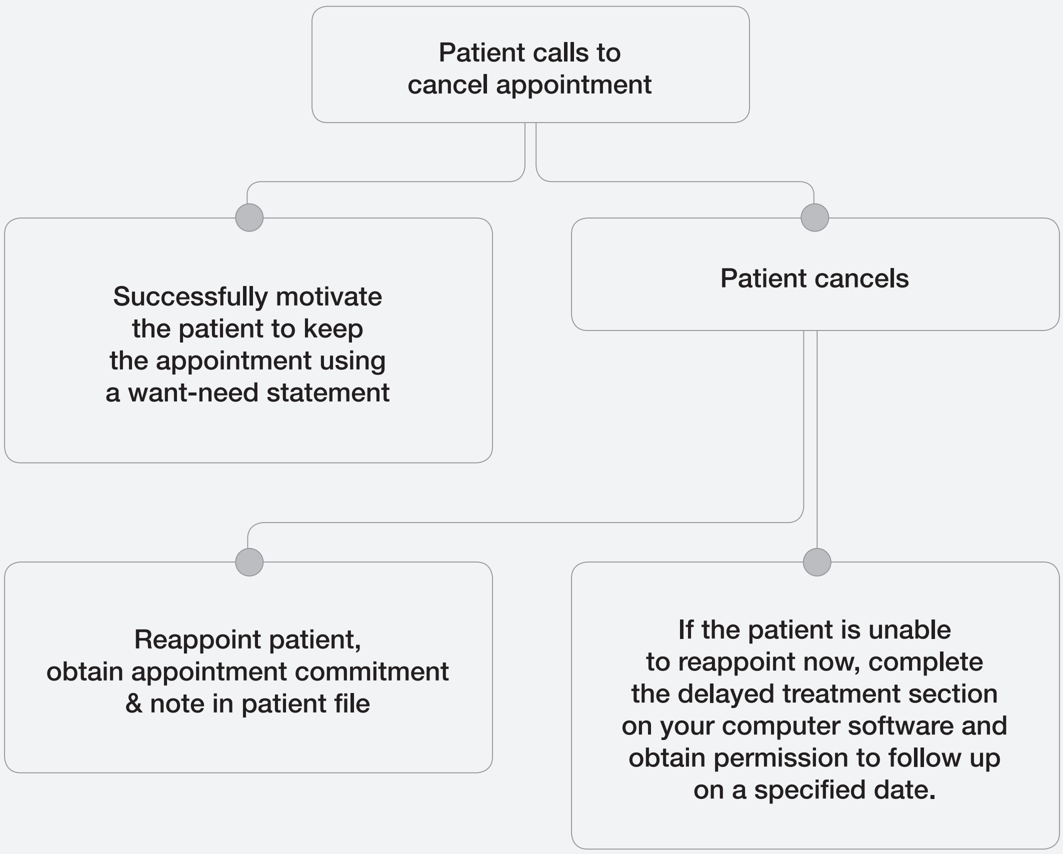
It is the final line that is the most important in this script.

Getting that commitment, though in a light, and informal manner, creates the expectation for the patient that they are expected, and that they have let you know that they will be there. By invoking the principle of commitment and consistency, you have ensured that they are more likely to keep their appointment.

What To Do If a Patient Cancels

Even with the best intentions, patients may still cancel, and knowing how to handle that is essential. If a patient does ring up to cancel, use the map/flowchart below to work through firstly motivating them to keep the appointment, then remaking the appointment immediately and obtaining a commitment from the patient to attend. If the patient declines to make another appointment immediately, then move on to obtaining permission to contact the patient to make another appointment, and ensure that the recall phone call is recorded in the practice management software.

Handling Cancellations



Key Points

- Cancellations and no-shows can be virtually eliminated with some thought and preparation. Keeping a full appointment book requires care on three levels:

  - Building value for the appointment
  - Having consequences in place for cancellations and repeat offenders (this does not have to be overtly stated to patients), and
  - Getting patients to commit to their appointments, publicly.

- Consequences can be as simple as staff letting patients know that there is a wait of some time for another appointment when they ring up to cancel.
- Invoking the principle of commitment is a very effective way for your team to reduce cancellations and no-shows in your practice.

DON'T LEAVE ME THIS WAY

Handling Complaints

You may occasionally have a patient bring an issue or complaint to your attention, or that of a staff member. Sometimes, a complaint is a precursor for a patient making a decision whether to stay at the practice or not. If a complaint is dealt with in a friendly, "can-do" manner, it is often possible to turn the situation around and have the patient decide to stay. For this reason, having a protocol for dealing with complaints, and making it a part of your practice system is an important tool in patient retention.

The main thing to remember when dealing with a complaint is that the patient *feels* that they have a grievance – it is not for you to comment on whether they are right to feel that way or not.

The three things to remember dealing with any complaint are:

- Use empathy – show the patient that you understand why they feel the way they do
- Find ways to say "yes" – using positive language, and having the aim of being helpful, and
- Avoid arguments at all costs – though this seems obvious, it is a common enough mistake to need stating here

If a patient leaves

Rather than follow the run-of-the-mill reaction and just facilitate the transfer of files when a patient leaves, if you take the opportunity to talk to the leaving patient, you can learn a lot about why they're leaving, and what you can do in future to plug that leak.

Most patients' reasons for leaving can fall under three main categories:

- **Lack of a relationship with and loyalty to the practice** – relationships cement our loyalties in every interaction that we have. If we do not have enough trust in the relationship with a service provider, then we do not have loyalty to them. It's as simple as that. Crafting your customer experience mindfully builds relationship with your patients.

- **Lack of perceived value.** Educating your patients on the difference between value and price – in a non-obvious way – is paramount. Building value has already been spoken about in previous sections, and is relevant yet again here, and

- **A negative experience leading to a breach of trust.** This can be clinical failure, a negative service experience, or a perception on the patient's part that you or a staff member is acting unethically.

When a patient leaves, conducting an exit interview is a good way to find out why they're leaving. Exit interviews are effective on a number of fronts:

- They help the patient feel heard. Never underestimate the value of listening to a patient. Focusing on building the relationship, even when they're leaving, helps to create an ideal customer experience at your practice.
- Listening to, and taking on board, criticism is a great way to improve the service that you provide for your patients.
- When patients leave feeling heard, they are far less likely to spread comments about their grievance with your practice. This point alone makes it worth taking the time with patients who are leaving you.

An exit interview can be in whatever form is most convenient for the patient. In my practice I use both an online survey, through Survey Monkey *(www.surveymonkey.com)* for which they are emailed a link that takes them to our survey, or a hard copy of the survey sent in the mail, with a stamped, self-addressed envelope to make returning it easy.

Once the survey is filled in, I personally call back the patient and thank them for filling it out. This gives me a chance to speak to them myself, and often leaves the door open for a patient to return, which does happen.

Exercise

- If you do not have a protocol for dealing with complaints, think about how you would like your practice to handle them. Create a step-by-step process for staff to follow when a complaint is brought to their attention.
- Examine your protocol for dealing with patients who leave. Remember that a leaving patient may have multiple touch-points with the practice. If you don't have an existing protocol, then create one for your practice now.
- Create a questionnaire to use in your exit interview. Visit Survey Monkey *(www.surveymonkey.com)* or create a hard copy.

Key Points

- Complaints can and do happen. They are an opportunity to deepen the relationship between the practice and the patient.
- Handling a complaint well will, at best, retain the patient, or give the patient who may go on to leave a positive experience with the practice before they go.
- You will most likely at some point have patients who indicate they are leaving the practice.
- Take the opportunity to ask for feedback that you otherwise may not receive.
- Creating a questionnaire to use as an exit interview is a useful way to gather feedback.
- Using the exit protocols as touch-points to create a good customer experience is a valuable process. Patients do sometimes return, and then go on to refer others to you.

BUILDING THE TRIBE

Your tribe of patients is the group of people who frequent your practice, pay their bills and refer others to you. Attention to the Three R's of Patient Flow – Retention, Reactivation and Recruitment – will make the difference between uneven and steady patient flow.

Don't make the mistake that most practices made and focus mainly on Recruitment. Patient retention is the foundation of building your tribe, because retaining patients is crucial to the success of any recruitment or reactivation campaigns.

Retention

Retention of customers hinges on all of the techniques I've discussed so far, so revisit the earlier exercises and make sure that you have implemented the steps you need to in your practice to ensure that your patients have a seamless experience at all of the touch-points they have with your practice.

Reactivation

Patients can have every intention of contacting your practice for an appointment, but somehow never get around to it. If your practice does not have a protocol in place for getting back to them in a timely way, you're letting them walk out the door, and losing their custom.

A Reactivation campaign is a marketing technique designed to invite inactive patients to make an appointment or series of appointments. This could be for their annual check-up, for follow-up treatment for which they did not attend the appointment, or to set up times to continue a round of scheduled appointments for treatments they need.

In an ideal world, appointment scheduling means each patient either has an appointment booked already, or the practice has a structured method to reconnect with them in future (that the patient has agreed to) such as a delayed treatment slip. In short, the philosophy is that the purpose of an appointment is to book another appointment.

Reactivation is triggered when appointment scheduling fails and a patient has 'fallen through the cracks' of the system. Even the best practices will have some patients in this category. Encouraging inactive patients to return to the practice is one of the most cost-effective ways of generating patient flow.

A reactivation campaign can be used when:

- You have just taken over a practice and want to get in touch with the patients on your database
- There is an issue with patient flow at your practice; that is, you regularly have empty appointment times in your schedule
- You are adding an assistant dentist or building a hygiene department
- Your annual file audit
- Your team has down time and can work on implementing this type of campaign

Keep in mind: Reactivation involves more than just sending a letter to a patient you haven't seen in a while. It is a campaign. A reactivation *campaign* represents a series of communication pieces. It is the *combination* of the communication pieces that drives patient flow. The success of your reactivation campaign is correlated to how well it is planned at the outset. By planning it in detail before you commence, you will enjoy greater success.

Here is the structure of Reactivation campaign we recently undertook at our practice.

Name	Letter1 + Outcome	Call1 + Outcome	Letter2 + Outcome	Email1 + Outcome	Call2 + Outcome	Notes

While there may be some who make an appointment based on your initial letter, many more will make appointments after subsequent pieces of communication.

The number one tip for reactivation is to reactivate early and often. The longer a patient is inactive, the harder they will be to reactivate.

Exercise

Design a reactivation campaign for your practice.

Recruitment

The best and most cost-effective way of recruiting patients to your practice is via Word of Mouth Marketing.

Patients who are referred by other satisfied patients are pre-sold, and expecting to have a great experience. If you provide that, you are fulfilling your part of the deal, and building relationship and trust. You will be rewarded with patient loyalty, and more referrals – if you arrange it that way.

Referrals should be asked for in a deliberate and considered way if you are going to utilise this valuable resource in your practice. It is best to ask patients for referrals within their first few visits to your practice, while they are still wowed by the experience, and before it becomes run-of-the-mill for them.

Exercise

Create your own word of mouth marketing system using the template below.

Earn

What can you do to earn a referral from a patient or referring practitioner?
How can you surprise and delight your clientele? *Hint – consider the customer experience.*

Set the Scene

Develop your protocol for letting patients and referring practitioners know that referrals are welcome.
Can you make it a condition of business? *Hint – consider a customer charter or referrer pack.*

Ask

Brainstorm how you will ask for the referral.
Remember to ask when the patient or referring practitioner is in a state of "Wow"

Reward / Recognise the Referral

Behaviour rewarded is behavior repeated.
Develop your protocol for recognising and rewarding referrals.

Key Points

- Retention, Reactivation and Recruitment make up the group of activities that will help you to build your tribe of patients
- Retention is by far the most overlooked, but also the most effective, strategy to use in this toolbox
- Conducting a reactivation campaign consists of a series of communication pieces in which you invite the patient to make renewed contact with the practice
- Recruitment can be derailed into costly marketing campaigns. It doesn't have to be so – you can build a thriving practice on word of mouth referrals, with a system for doing so.

THE POWER OF AN ELITE TEAM

Staff play a critical role in patient retention.

This is a fundamental fact that underpins the discussion of having an elite team working in your practice. Other benefits include the leverage a great team affords and improvements in productivity and morale, none of which are insignificant. However, without an elite team functioning well, your practice will leak patients, and therefore profits.

Recruiting ‘A’ Players

Finding, and then supporting, your team will free up your time to focus on running your practice, rather than trying to be all things to all people. You are not a one man band, rather, you are the conductor of the orchestra. Making sure you have quality help, and that you’re not trying to play every instrument, also benefits your patients. Their experience will be far better for your efforts in building your team. And remember: patient experience is everything.

Exercise

As with every other aspect of running a successful practice, if you create a protocol for recruitment, your process will be smoother.

See the Staff Recruitment Checklist below for an outline of all of the steps that you need to take when recruiting a new staff member, no matter what position you're recruiting for. Take each step, and develop the items and processes for that step that suit your practice:

Recruitment Checklist

- [ ] 1. **Position Description**
  Including tasks, accountabilities and responsibilities.
  Signature strengths of ideal candidate.
- [ ] 2. **Organisation Chart**
  Where does this role fit into the organisational structure.
- [ ] 3. **Cashflow**
  Has Position been budgeted for?
  Can the business afford the wage?
- [ ] 4. **Create and Place the Advertisement**
- [ ] 5. **Sort and Vet Applications**
- [ ] 6. **Prepare Interview Questions, Skills Tests and Evaluation Form.**
- [ ] 7. **Initial Interview** Signature Strengths Of applicant,
  Wealth Dynamics profile, Interview questions, Skills test
- [ ] 8. **Due Diligence**
  Reference checks, Check registration if applicable
- [ ] 9. **Formal Job Offer** Letter of offer, enterprise agreement
  If a contractor, provide a written contract
- [ ] 10. **Training Chart**
  Develop Training Chart and Review Progress weekly

Training Your Team

There is a strong link between staff retention and patient retention. If you retain staff, you will retain patients. Retaining key staff is also critical for ongoing productivity. Because one of the key factors influencing staff retention is the opportunity for professional development, it is critical that staff are trained in a systematic manner.

Most employers find training a burden and try to fit it in around other tasks. The result is that training is often ad-hoc and incomplete. In our practice we use a training chart so that new staff members are trained over a period of 12 weeks. This allows the practice to prioritise different elements of training and allows the staff member to focus on a few tasks each week, avoiding overwhelm.

Task	Resources	Week 1	2	3	4	5	6	7	8	9	10	11	12
Appointment Scheduling													
Answer telephone according to script by third ring													
Respond to all messages promptly													
Book appointments according to financial goals and office protocol													
Send out welcome packs													
Greet patients courteously on arrival													
Encourage patients to keep appointments using flow chart													
Ask who else might need an appointment when scheduling one family member													
Follow up broken and cancelled appointments													
Follow up unscheduled treatment													
Ensure patient charts are up to date													
Ensure EVERY patient leaves with a follow up appointment or a scheduled time to reconnect													
Encourage 6 monthly recalls are booked now													
Ensure recall system up to date													
Check old / archived files and undertake re-activation every 6 months													

BRINGING IT ALL TOGETHER

Implementation is the magical ingredient that will bring all of these processes and protocols to life for the benefit of your practice. Nothing will happen if you just read the advice I'm giving here and nod in agreement: you have to actually *do something*.

Goals

Setting a clear goal, writing it down, and then making a plan to accomplish it will get you further towards your desired end result than merely thinking of your goal. Goal-setting is recognised as a common trait of successful people the world over, regardless of the endeavour. The act of setting a goal narrows your focus to only things that relate to that goal, which therefore helps you to achieve them.

Exercise

Take some time to set some goals for yourself and your practice. Use the worksheet below to decide on your goals, break them down into milestones and see what actions you can put in place to ensure that you meet your goals. Remember to schedule regular time to review your progress and course-correct if you need to.

Goal Setting

"What is the one thing I can do for my business such that by doing it, everything else becomes easier or unnecessary"

Gray Keller, Author – The One thing

12 Month Goal

Result: ....

Purpose: ....

Date: ....

	MILESTONES	ACTION STEPS
Q1		
Q2		
Q3		
Q4		

Key Points

- Implementation is the key to success with all of the elements I've written about in this workbook.
- Breaking down your goals into actionable steps will make them easier to achieve.
- Checking in with your goals on a regular basis and scheduling time in to work on them will ensure you reach them.

Final Word

It is my sincere wish that working through the steps in this workbook brings you the best benchmark of success in your practice: patients who pay, stay and refer.

If you would like to know more about working with me, please get in touch at **hello@drjessegreen.com.** I'd love to hear from you.

RETENTION!
How to Plug the #1 Profit Leak in your Dental Practice